



Age: 43

Job: COO

Income: \$390,000

Family: married

Location: Riverside, CA

Bio

Steve is a 43-year-old COO of a furniture manufacturer from Riverside, California. He is married and has two children. Steve was hesitant to take over the job at his current employer, as he had heard not the best things about the inland empire, especially pollution and traffic, were concerns. But as a California native, he is glad to be close to the coast again and enjoying the more pleasant climate. Before this job, he worked at a competing manufacturer for five years in Michigan.

Needs

Steve has taken over his role in the last year. His new employer grew during the pandemic when everyone bought furniture. The processes in the company were not ready for the increased demand, and Steve's number one task is digitalizing and streamlining as many processes as possible. Especially with an economic downturn on the horizon, sales and marketing need to step up and create more opportunities, especially in the office sector.

Currently, Hubspot is used by the marketing department and, to some extent, by the sales team. But neither is satisfied with the options available, and Steve thinks a robust CRM system is the backbone every company needs. He is looking at options and has watched some presentations but is not yet sold on any solution on the market.

Go-To:

- **Learning Curve:** Steve fears a new CRM system could be a roadblock at crucial times. The marketing and sales teams need to pull their weight right now, and there is little time for training. But he is unwilling to wait until there is time due to the missed opportunities. Steve is looking for a solution that offers hands-on training and self-paced learning capabilities. Steve joined a Salesforce demo and was deterred by the switch between Salesforce Classic UI and Lightning. If you even have to switch between user interfaces depending on the task, you need extensive training.
- **Stability:** Steve has read about stability issues with Salesforce, which was his favorite due to the size of the software and backing company. There are quite some complaints of Salesforce freezing and rendering whole teams helpless until Salesforce starts working again.
- **Maintenance:** Steve has seen outrageous problems with SAP ERP in his last role and wants to avoid the same problems at any cost. Without dedicated engineers, it is impossible to customize or update customized software. Steve wants to buy a CRM, not hire three engineers.
- **Costs:** Steve likes the marketplace approach of Salesforce. Most companies have similar problems, and not everyone needs to have a custom solution programmed. But Steve browsed around the marketplace and was astonished to see how quickly the costs add up, rendering Salesforce uneconomical. Additionally, the contracts seem very intransparent. There is a yearly increase in costs written in the contracts. Combined with extended contract periods, these hidden fees can be hefty.
- **Locked-In:** Steve knows that implementing a new CRM system is equivalent to open-heart surgery. He is carefully thinking of every possible problem or roadblock in the future. One point he never thought about, but picked up in online discussions, is being locked in a system without a clear way out. From what he learned, Salesforce is not actively hindering people from moving to a different solution, but they sure are not making it easy.



Interests



Running

Steve is a passionate runner. He has run since College and, during the pandemic, stepped up his training regimen. He aims to participate in a Marathon the following year, reading training recommendations online and discussing his experiences online.



Art

Steve loves visiting museums. His life is pretty hectic, and he enjoys moments of solace in a museum when he thinks about what an artist wanted to communicate and which techniques he used to express himself. Especially following an artist's creations over time, you can notice changes in art that can be tied to the biographical events of the artist.

Emotions



Anger: Steve gets angry whenever he suffers through a meeting that only paints flowery pictures of software without addressing direct questions or requirements mentioned prior. It is just a waste of everyone's time.



Fear: Steve fears that a decision regarding the operational data of sales and marketing can put the company in a gridlock. But he sees no alternative but to tackle the challenge head-on and push it through as fast as possible.



Joy: Steve loves to see improvements. He envisions gears working in unison when all comes together. He is looking forward to the pivotal moments when organizational changes start manifesting results.



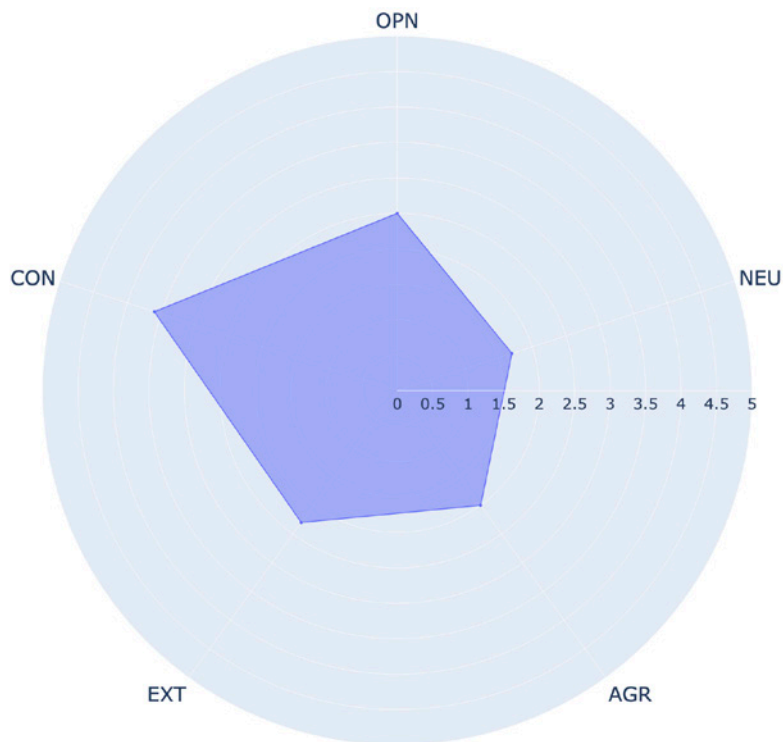
Thankful: Steve is thankful for the online communities where experiences are shared freely. Finding good groups without constant sales pitches took some time, but it was worth the time investment.

- Representative
- Non Representative



Representing

Steve represents a segment of decision-makers in the market for a new CRM system. These users have experience with software suites and have a set of features they want to see. Most of these users have a solution that is insufficient for their needs and are willing to switch. Besides features, costs, especially hidden costs, are the main concern for users like Steve. They oversee a solution's whole lifecycle, including training and possible data export. Users like Steve react adversarially if they feel their time is wasted with marketing speech without discussing their requirements.



OCEAN Personality Traits COe

Conscientiousness

People who score high on Conscientiousness tend to be organized and orderly. People with a high score in this trait get things done and do them well.

Openness to Experience

People who score high in openness to experience are more curious, imaginative, and receptive to new ideas.

Extraversion

People who score high on Extraversion thrive in social surroundings. They are people focused and communicative.

Ad Recommendations

Ads: Data Savvy, Rich Media and Video Ads

Use data and diagrams to prove your point. Rich Media and Video ads that show individuals using your products and how it makes a difference work best. Show what is new and exciting.




Conscientiousness: Prove your point with data. Show how your product does what it does to help her achieve great results.

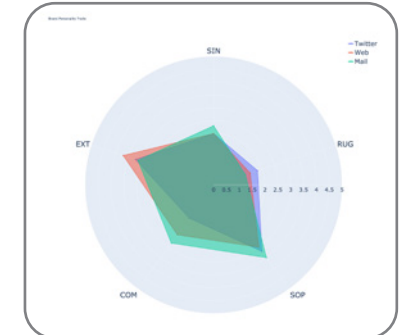
Openness: Use images and words to explain why your product is a true innovation, why it is sophisticated, and what new opportunities your products offers. What makes your products different?

Extraversion: Imagery of people in the focus or spotlight work best. Use language that can be seen as the beginning of a dialog. Ask questions in your copy.


Brand and Customer Alignment



	88.88%	Homepage customer alignment
	87.5%	Twitter customer alignment
	88.88%	Newsletter customer alignment




Brand Personality Assessment

 **Salesforce Homepage**

Main trait: Excitement 3.7
 • Daring
 • Spirited
 • Imaginative
 • Up-to-date

2nd trait: Sophistication 3.0
 • Upperclass
 • Charming
 • Romantic

 **Salesforce Twitter**

Main trait: Excitement 3.2
 • Daring
 • Spirited
 • Imaginative
 • Up-to-date

2nd trait: Sophistication 3.2
 • Upperclass
 • Charming
 • Romantic
 • Glamorous

 **Salesforce Newsletter**

Main trait: Excitement 3.5
 • Upperclass
 • Charming
 • Romantic
 • Glamorous

2nd trait: Sophistication 3.1
 • Upperclass
 • Charming
 • Romantic
 • Glamorous